ELECTRONIC DOCUMENT REVIEW (EDR) USER GUIDE

SPECIAL USE PERMIT APPLICATION

November 29, 2017

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Electronic Document Review (EDR) Application Process

Electronic Document Review (EDR) is a new on-line planning application submittal process provided for limited number of Planning Services applications. EDR allows applicants to access the <u>On-line Permit Manager</u> (also known as Citizen Access Portal) to file a planning application electronically for application submittal to receive review comments. The on-line system involves a 7-step process for submitting application, upload of Adobe PDF application materials, payment of fees and obtaining a tracking number. The process allows you to submit and check the status of the EDR submittal on-line 24 hours a day, 7 days a week.

Please note: All EDR application submittals go through the same standard review process as hardcopy paper submittals. <u>Submittal of an EDR application does not expedite the review</u>.

The benefits of the EDR application process eliminates the need for multiple paper copies and a saves on trips to the Maricopa County Planning and Development Department for submittal of application, revisions or modifications. The electronic copy of application materials are simultaneously routed to all County agencies for review/comments. The process will provide the applicant redlines and comments from all agencies in a single consolidated document.

Identified below is a quick checklist of items required to process an application on-line:

- ✓ Setup an On-line Permit Manager Account via On-line Permit Manager (also known as Citizen Access Portal)
- ✓ EDR Application User Guide Special Use Permit Application Provides detailed instructions on the application requirements and the on-line submittal process
- ✓ Completed and signed Special Use Permit Application and supporting documents saved in Adobe PDF format
- ✓ Trust account, credit card or bank account to pay application fees

The on-line application process includes a streamlined 7-Step process on-line. The submittal allows you to save a pending application and come back at a later date to complete the submittal. A temporary number will be generated if you decide to hold off on application submittal. Please note this temporary number does not start the review clocks and is not routed to the Digital Counter for processing.

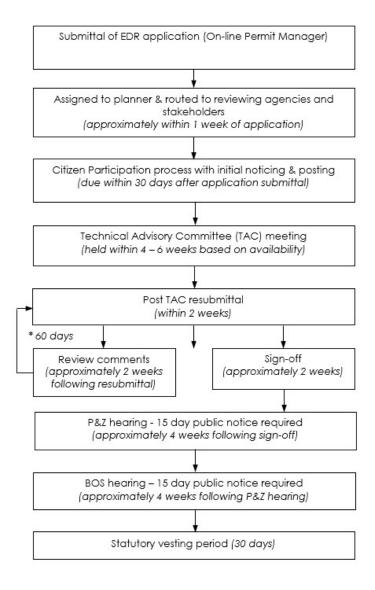
The streamlined process includes the following screens:

- 1. **Project Information** description of project and selection of special use permit application
- 2. **Applicant Information** applicant contact information
- 3. **Owner Information** ownership contact information
- 4. Attachments upload of application materials
- 5. **Review** review of data entry for the EDR application
- 6. **Pay Fees** payment of application fees
- 7. **Initialization** case tracking number provided



EDR Application Process & Timeframe

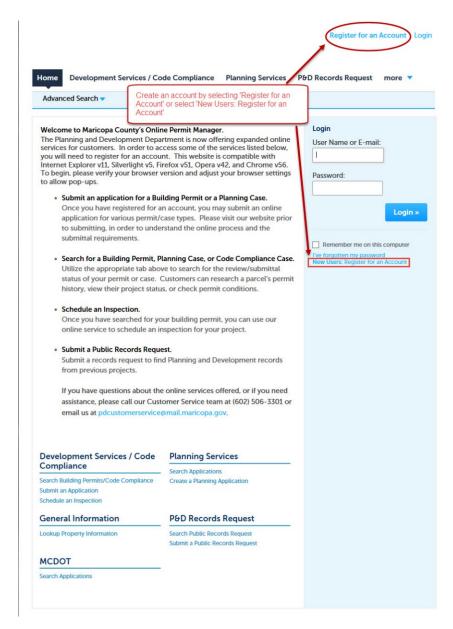
The flowchart shown below identifies the EDR application process and timeframe for the Special Use Permit application. A Special Use Permit application typically takes about 6 months for processing to the Board of Supervisors. The process outlined below is based upon only 2 review cycles and two weeks resubmittals.

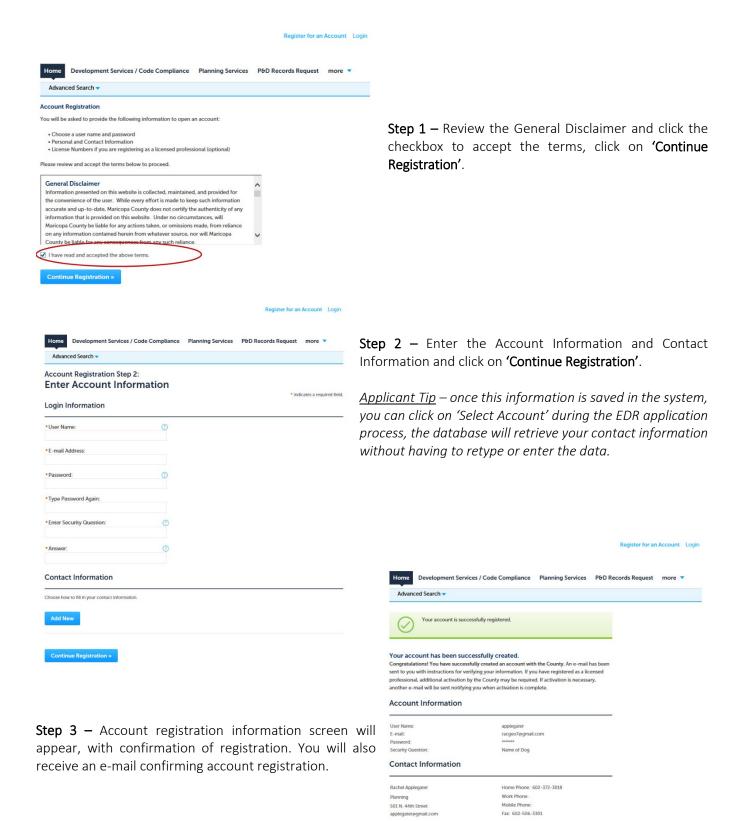


How to Setup an Account - On-line Permit Manager

Go to the On-line Permit Manager to register for an account.

Register for an Account - Click on 'Register for an Account'. EDR application submittal requires setting up an On-Line Citizen Access account. Begin Account Registration by reviewing and accepting the general disclaimer.





Special Use Permit Applications being accepted for EDR

Planning and Development has included the Special Use Permit applications for the EDR on-line application process. The following listing identifies all applications being accepted for EDR submittal.

<u>Applicant Tip:</u> Please see the individual sections within this User Guide for required application materials, instructions, required attachments and fee structure.

Special Use Permit – Major Amendment Special Use Permit – Minor Amendment

Download the Special Use Permit Application Packet

Download the Special Use Permit Application Packet from the Planning Services website from the <u>EDR Planning Application Process</u> website. The application packet will contain the application form, processing timeframes, list of submittal documents and the associated review fees.

The application packet has a blank **Special Use Permit application form** to be filled out completely with signatures. Once the form is filled out and signed, scan the document as an Adobe PDF for upload on Step 4 - Attachments.

Submittal Requirements and Recommendations

Please use the following instructions to prepare your documents for electronic plan check. Note that *Plans* have different submittal recommendations than supporting documents/attachments.

- ✓ All PDF files must be under **50 MB** in size.
- ✓ Filenames <u>SHOULD NOT EXCEED 140 CHARACTERS</u> in length and paper sizes should not exceed 36x48 inches.
- ✓ Resolution should not exceed 200 DPI.
- ✓ Files must be saved in **PDF 1.4 OR GREATER**.

<u>Applicant – Quick Tip:</u> Retain a copy of the submitted file to later verify the filename and sheet order (during resubmittal). Revision/Resubmittals may be rejected if not submitted with a filename that exactly matches the original submittal filename.

A. PREPARING PLANS FOR SUBMITTAL

Creating PDF's: Each 'Plan' (or 'Plan set') must be saved as a **flattened/optimized PDF.** Flatten the drawing layers in your CAD program prior to creating the PDF, or use the 'SAVE AS/FLATTENED' and/or **optimized** PDF option available in your PDF tool. <u>Plans that have 'layers' are not acceptable</u>.

Saving PDF's with consistently formatted, sequential bookmarks is helpful and encouraged. If multiple PDF's are merged, verify that bookmarks are consistent. Nested bookmarks are not officially supported. Ideally, a bookmark consists of the Sheet number and a short description (example: G1.0 General Notes)

Naming Plan Sets:

We recommend grouping and submitting plans in smaller, logical sets to facilitate the electronic plan review. If plan sets are larger than the 50MB limit, break the pdf files into smaller sets for online submittal.

Example: Site Plan, if the files are too large, break the document into smaller sets such as follows with the naming convention:

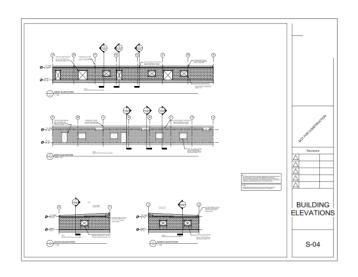
SITE-PLAN_01 SITE-PLAN_02 SITE-PLAN_03

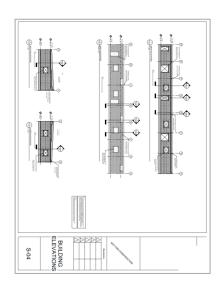
Page Orientation and Alignment:

1. <u>Pages must all be properly oriented</u>, meaning upright, **not** sideways or upside down, so that the document can be viewed without rotation. Failure to submit correctly oriented plans may result in a 'Hold' being placed on a submittal, which will delay review.

Applicant – Quick Tip

To verify that pages are properly oriented, open the document in your <u>PDF application</u> and do a 'print preview'. Scroll through each page in the preview window to make sure the pages are properly oriented. Make sure the correct <u>paper size</u> is selected.





CORRECT

NOT CORRECT

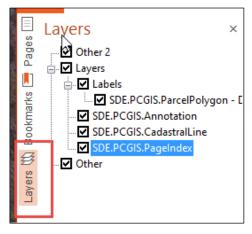
2. <u>Alignment: Plan drawings must be created in your CAD program so that drawing perimeters</u> 'line up' exactly when overlaid electronically.

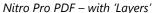
- Revised/corrected plans <u>must 'line up' with the original submittal</u> to facilitate comparing versions electronically.
- 3. Plans must be saved 'to-scale' to ensure proper measuring of lines and areas electronically.
 - Include a scale on each sheet or include the measurements for each object.
- 4. Plans should be plotted/drawn using a <u>black and white</u> plot style. Grayscale, monochrome and colored pens are not encouraged.
- 5. Do not submit password protected or locked PDF documents. Plan reviews are conducted on copies of the original files provided. The original PDF's are not changed in any manner.
- 6. After saving the CAD files to PDF format, do an annotation check **ensure that no 'comments' or 'editable content' exists** in the file. (Embedded hyperlinks are acceptable.)
- 7. Paper plans scanned from a photocopy to PDF format are acceptable, but should be clearly legible and follow the same rules noted above.
- 8. Open each PDF using *Adobe Reader/Adobe Pro* and select 'File/Save As'. Adobe is the best tool for resolving corrupted or malformed files. <u>Do not submit PDF's that Adobe indicates are corrupted</u>.
 - Ensure the file name meets the naming recommendations.

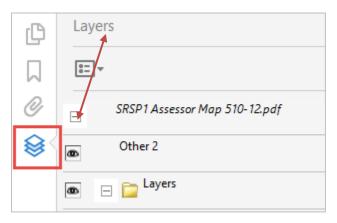
Electronic plan review software <u>relies</u> on correct (PDF/A compliant) information that is embedded in every PDF document (the *metadata*). For intellectual property and security reasons, plan review software does not and should not change incoming files. Here are some guidelines for *resolving potential issues* before you submit your plans.

How can I tell if my PDF has 'Layers' or other 'Editable Content'?

Most *PDF compliant* software (like *Adobe Reader, Adobe Pro, Nitro Pro*, etc.) display a Layers *icon* when a document contains layers, (see below). The Layers icon <u>is not displayed</u> if the file contains no layers recognized by the PDF tool.







Adobe Reader PDF - with 'Layers'

Other 'Editable content' includes: active form fields, stamps, comment or text boxes, signatures, or markups that can be deleted from the PDF by any user. Editable fields will have a blue background within the PDF. Open the Comment window in your PDF tool to see these types of objects. If any of these are found, please flatten the PDF or remove them. These include plans that use AutoCAD SHX Text objects – this font type that has compatibility issues in many PDF viewers.

Why do 'Layers' and 'Editable Content' need to be removed from the PDF?

Many tools on the market convert CAD drawings/plans to a PDF format. Unfortunately, some of these tools do not properly translate CAD layers or content. Additionally, conversion irregularities introduced by the CAD program or flatbed scanner may introduce errors into the PDF document. Do not submit files with *any editable content*. If an 'object' can be edited or deleted in the PDF, the document is not acceptable.

Why is page rotation so important?

PDF tools that allow users to 'rotate' pages <u>should properly record that 'rotation' within the PDF document.</u>
When this rotation is not properly set by the PDF software, those pages may end up printing upside down or sideways when they are sent to a printer.

What does PDF optimization do?

PDF Optimization reduces file size by removing embedded fonts, compressing images and removing unused objects and improper metadata. Optimization is critical to reduce or eliminate PDF corruption.

B. NAMING SUPPLEMENTAL DOCUMENTS

Supplemental documents or attachments are any files that are not plan sets. These may include Permit Applications, Soils Reports, Calculations, images, etc. These must also be **submitted in PDF format with a unique, descriptive filename.**

Attachments and Naming Convention Structure

There are specific naming conventions that must be followed when saving files for EDR application submittal. The table shown below specifies the required application submittal document and required naming convention and document description.

Applicant Tip: All documents must be saved as **Adobe PDFs** for upload and are limited to a 50 MB size limit. If you need to separate documents into smaller files, utilize the naming convention structure as identified in the Naming Sets section of this guide. Example: SITE-PLAN_01.pdf, SITE-PLAN_02.pdf, SITE-PLAN_03.pdf

Special Use Permit

Required Documents	Special Use Permit	Required Naming Convention	Document Description
✓	Pre-Application Meeting Form	PREA-DETL	1st Sub-Preapp Summary
✓	Special Use Permit Application	APPL-FORM	1 st Sub-Application Form
✓	Unofficial or Official Recorded Deed(s)	DEED-DETL	1 st Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1 st Sub-Site Plan
✓	Narrative Report	NARR-RPTS	1 st Sub-Narrative Report
✓	Citizen Participation Plan	CITI-RPTS	1 st Sub-Citizen Plan
✓	Photographs of the property	PHOT-DETL	1 st Sub-Photos
	Drainage Report/Plan (if required)	DRAI-RPTS	1 st Sub-Drainage Report
	Traffic Impact Study (if required)	TRAF-RPTS	1 st Sub-Traffic Report

Special Use Permit – Major Amendment

Required Documents	SUP – Major Amendment	Required Naming Convention	<u>Document Description</u>
✓	Pre-Application Meeting Form	PREA-DETL	1 st Sub-Preapp Summary
✓	Special Use Permit Application	APPL-FORM	1 st Sub-Application Form
✓	Unofficial or Official Recorded Deed(s)	DEED-DETL	1 st Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1 st Sub-Site Plan
✓	Narrative Report	NARR-RPTS	1 st Sub-Narrative Report
✓	Citizen Participation Plan	CITI-RPTS	1 st Sub-Citizen Plan
✓	Photographs of the property	PHOT-DETL	1 st Sub-Photos
	Drainage Report/Plan (if required)	DRAI-RPTS	1 st Sub-Drainage Report
	Traffic Impact Study (if required)	TRAF-RPTS	1 st Sub-Traffic Report

Special Use Permit – Minor Amendment

Required	SUP – Minor Amendment	Required Naming	Document Description
<u>Documents</u>		<u>Convention</u>	
✓	Pre-Application Meeting Form	PREA-DETL	1st Sub-Preapp Summary
✓	Special Use Permit Application	APPL-FORM	1 st Sub-Application Form
✓	Unofficial or Official Recorded Deed(s)	DEED-DETL	1 st Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1st Sub-Site Plan
✓	Narrative Report	NARR-RPTS	1 st Sub-Narrative Report
✓	Photographs of the property	PHOT-DETL	1 st Sub-Photos
	Drainage Report/Plan (if required)	DRAI-RPTS	1st Sub-Drainage Report
	Traffic Impact Study (if required)	TRAF-RPTS	1st Sub-Traffic Report

Application Fees for Special Use Permit Application – EDR

The table below identifies the type of Special Use Permit applications with the associated review fees. Please note the on-line submittal automatically charges the Planning, Drainage Review, MCDOT, MCESD and Addressing review fees. If the site is addressed then an address verification fee of \$10 is assessed, if the site is without an existing address the Digital Counter upon review of application submittal will notify the applicant of the Addressing review fee of \$50. All application fees are owed prior to routing of the EDR application to County agencies.

Type of Special Use Permit Application	Planning Review Fee	Drainage Review Fee	MCDOT Review Fee	MCESD Review Fee	Addressing Review Fee
Special Use Permit	\$3,000 + \$100 per acre or portion thereof (Maximum of \$50,000)**	\$1,000 + \$500 per acre or portion thereof (Maximum \$11,000) Disturbance of less than 1,500 sq. ft. \$650 ***	\$250	\$225	\$10 or \$50 *
			T		
SUP – Major Amendment	\$3,000 + \$100 per acre or portion thereof (Maximum of \$50,000)**	\$1,000 + \$500 per acre or portion thereof (Maximum \$11,000) Disturbance of less than	\$250	\$225	\$10 or \$50 *
		1,500 sq. ft. \$650 ***			
SUP – Minor Amendment	\$750 + \$100 per acre or portion thereof (Maximum of \$5,000)**	\$650	\$250	\$225	\$10 or \$50 *

- * Please note with EDR on-line submittal, the system will automate a \$10 addressing fee. The \$10 fee is based upon if the site has an existing address. If the parcel has not been assigned an address then the Addressing Review Fee will be adjusted to \$50. A change in the application fee will be evaluated as part of the Digital Counter review, and notification will be sent to the applicant to pay the outstanding balance.
- ** The Planning application fee will be doubled if there is a Code Violation on the property.
- *** The Drainage Review fee for disturbance of less than 1,500 sq. ft. will be evaluated during the Digital Counter Review by staff. Please note the system will auto-generate the standard drainage fee of \$1,000 + \$500 per acre for Special Use Permit and Special Use Permit Major Amendment.

Trust Account – If you will be submitting multiple EDR applications to the County, you might be interested in setting up a Trust Account with the Planning and Development Finance Division. The trust account allows you to deposit monies and the County will draw down application fees from the account. There is a minimum balance required in the amount of \$1,500 that must remain in the account at all times to participate in the program. The Finance Division will e-mail a Trust Account Activity Sheet which will list all deposits and withdrawals on the 1st of each month to the listed contact representative.

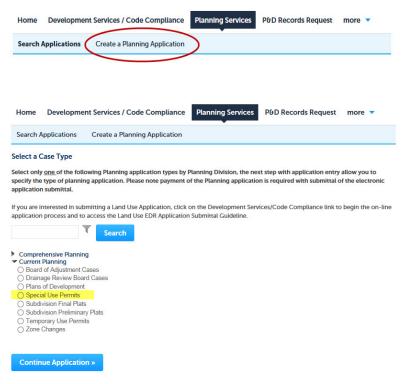
Contact the Planning and Development Finance Division at 602-372-1359 to obtain the Trust Account Application Form.

Save and Resume Later Option

The On-line Permit Manager has a function that allows application information to be saved and resumed at a later date. Please note the On-line Permit Manager only allows for information and uploaded attachments to remain in the system for **90 days**, after 90 days the information and any uploaded attachments will automatically be deleted from the system. The temporary files are not transferred to the database, staff does not have the ability to access the information or files on the On-line Permit Manager. After 90 days, the applicant will need to start a new EDR application for processing. Staff will not receive the application until fees are paid and a tracking number has been issued as part of Step 7.

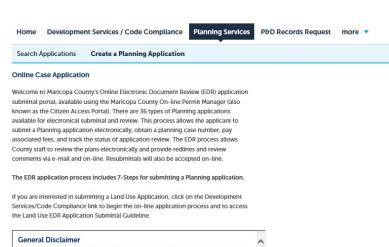
EDR – Step 1 – Project Information

Once an account has been setup, login with the account information and follow the steps as identified below for the Special Use Permit application submittal. Submittal of the Special Use Permit application is within the Planning Services module.



Go to 'Planning Services' located within the top banner. Navigate to the blue banner and click on 'Create a Planning Application'.

Review the General Disclaimer and check the box indicating that you have read and accepted the terms. Click on 'Continue Application'.



Select the drop down arrow next to Current Planning and select 'Special Use Permit'. Click on 'Continue Application'.

By submitting this application, the applicant does hereby reaffirm agreement to the conditions indicated when the applicant created an account on this website. This includes Conditions of Use, External Links, the Privacy Policy, Communications made through this website, and other such terms.

Application Requirements

✓ I have read and accepted the above terms.

It is the applicant's responsibility to obtain proper authorization from the property

Continue Application »

The first step of the application process is to select the correct subtype of the Special Use Permit application.

Project Type: There are two selections available, 'EDR Review Project' and 'Project does not require EDR'. Please note it is critical to select 'EDR Review Project' for on-line application submittal and review. The secondary drop down item, 'Project does not require EDR' will generate an autoscripted message that will stop the special use permit application process.

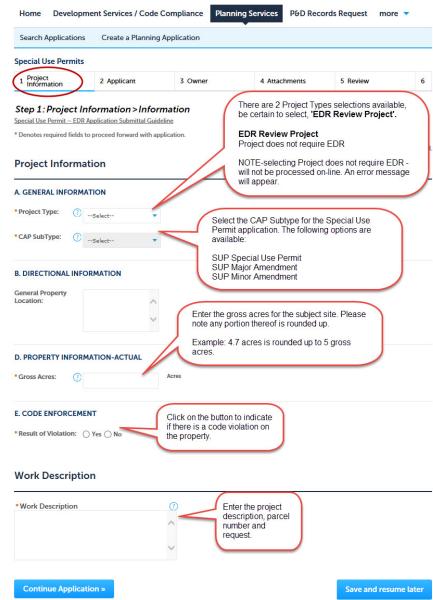
CAP SubType: The drop down displays the applications available for EDR submittal. Select the type of application being filed.

Gross Acres: This is the total gross acres of the subject site. Please note any portion thereof should be rounded up. For example if the site is 4.7 acres, the number to be submitted with the EDR application is 5 gross acres.

Result of Violation: Please check the button to address if there is an existing Code violation on the property.

Work Description: This is an open field

to describe the project, identify the parcel, and specify the type of application being requested.



The on-line system has the ability to save the EDR application submittal and to resume the application at a later date. Please note a tracking number will not be assigned, a temporary number will be generated and the temporary application will display under 'My Records'.

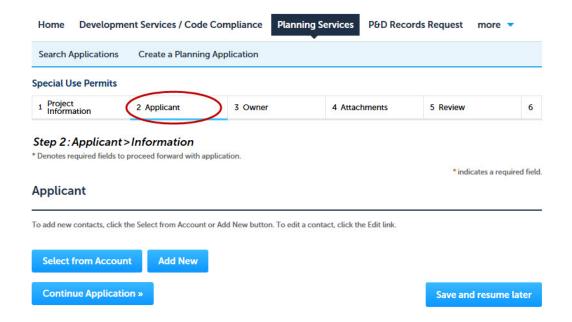
Once these fields are completed, click on 'Continue Application' to move to Step 2 – Applicant Information.

EDR – Step 2 – Applicant Information

This screen displays the applicant information, this will be the primary contact person with the EDR application. Staff will coordinate comments with the listed applicant. Only one applicant can be identified for notification.

Please note due to creation of the On-line Permit Manager account, you can default your contact information by selecting 'Select from Account'.

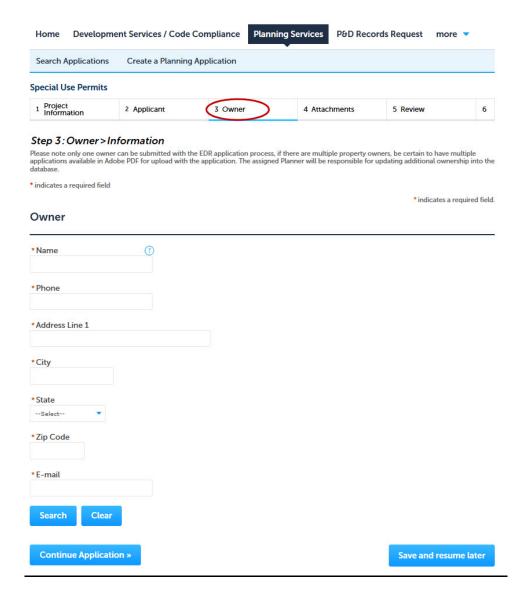
The on-line system also allows you to enter a new Applicant, select 'Add New' and enter the contact information with first and last name, organization, address, city, state, zip, phone, and e-mail. Click on 'Continue' when completed.



EDR – Step 3 – Owner Information

This screen displays the owner's information. Please note the system is setup to enter a single property owner. Any additional property owners will need to be submitted as supplemental Special Use Permit application as additional documents with the upload on the Attachments screen (Step 4 – Attachments). Planning staff will enter the additional ownership in the database upon verification of the additional ownership.

Enter the Owner's name, address, city, state, zip, phone and e-mail. Please note Planning staff will utilize the applicant's information screen (Step 2) as the primary contact with the EDR application and for providing review comments. Once the screen is completed you can click on 'Save and resume later' or 'Continue Application'.



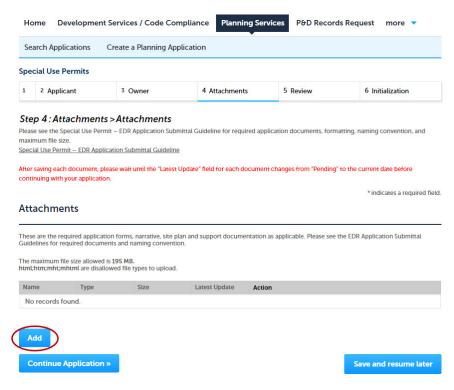
EDR – Step 4 – Attachments

This screen allows you to upload the required Adobe PDF minor amendment to a development master plan application and documents. Please see the required submittal documents as referenced in this guide.

Applicant Tip: Please note the **file size** limitation is 50 MB.

Click on 'Add' to attach files.

Once you click on 'Add' a pop-up window will appear, click on 'Add', this will display the files on your computer, navigate to the files for upload and click on 'Open'.



File Upload × The maximum file size allowed is 195 MB. html;htm;mht;mhtml are disallowed file types to upload. 100% APPL-FORM.pdf 100% CITI-RPTS.pdf 100% DEED-DETL.pdf 100% DRAI-RPTS.pdf 100% NARR-RPTS.pdf Remove All Continue Add Cancel

The pop-up for file upload will show the file name and percentage of upload.

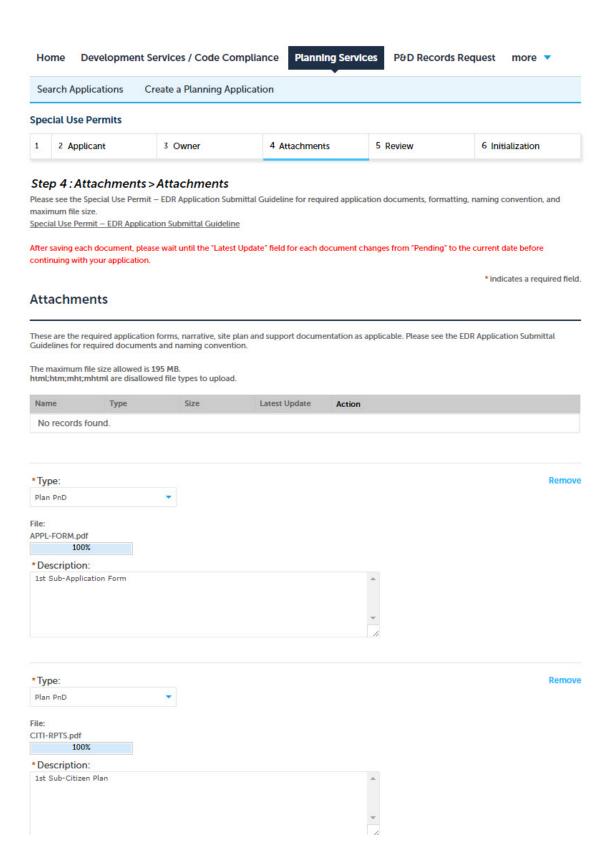
The pop-up window has the following options:

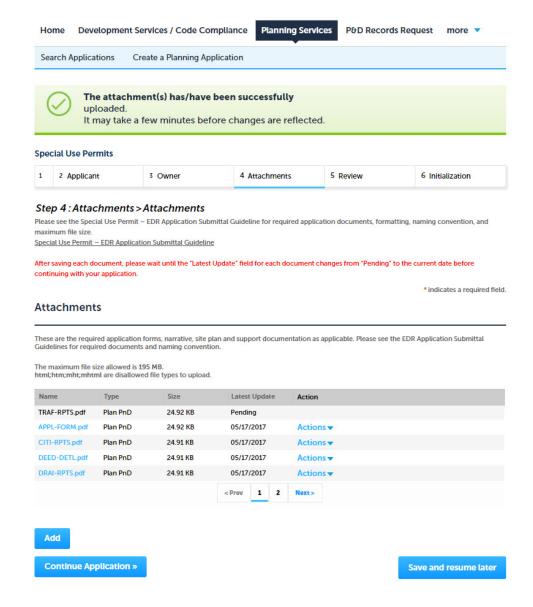
'Continue' - make this selection if you have completed all upload of file documents.

'Add' – this feature allows you to include additional files.

'Remove All' – this will remove all linked attached documents.

Click on 'Continue', the attachments page will appear showing the file name, percentage of upload and a section to enter a brief description of the document. Click on 'Save' then click on 'Continue Application'.





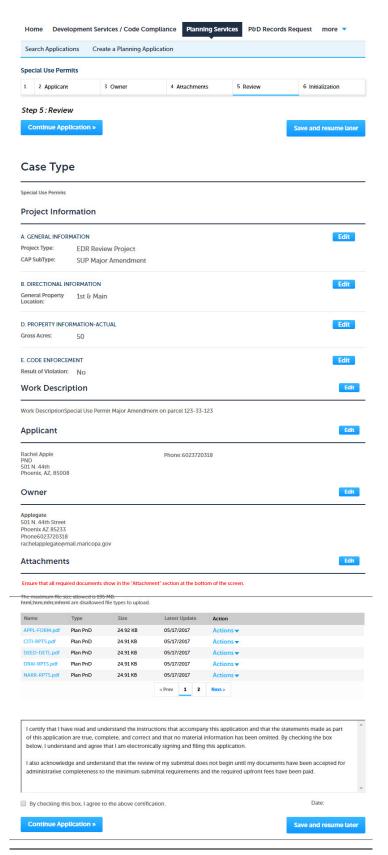
A summary screen of the uploaded attachments will appear. Please note the section marked as 'Latest Update' must change from 'Pending' to the date of application submittal, do not press 'Continue Application' until you see a date listed for each attachment.

Please note the top banner screen will indicate, 'That attachment(s) has/have been successfully uploaded' — please note this is a standard banner which will upload when the screen loads. There may be instances where the system is still generating the upload, so please wait until a date is identified in the 'Latest Update'.

Click on **'Continue Application'** to proceed to Step 5 to review the EDR application.

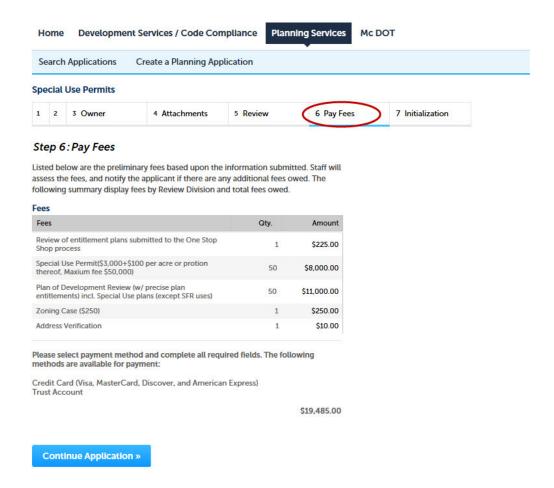
EDR – Step 5 – Review

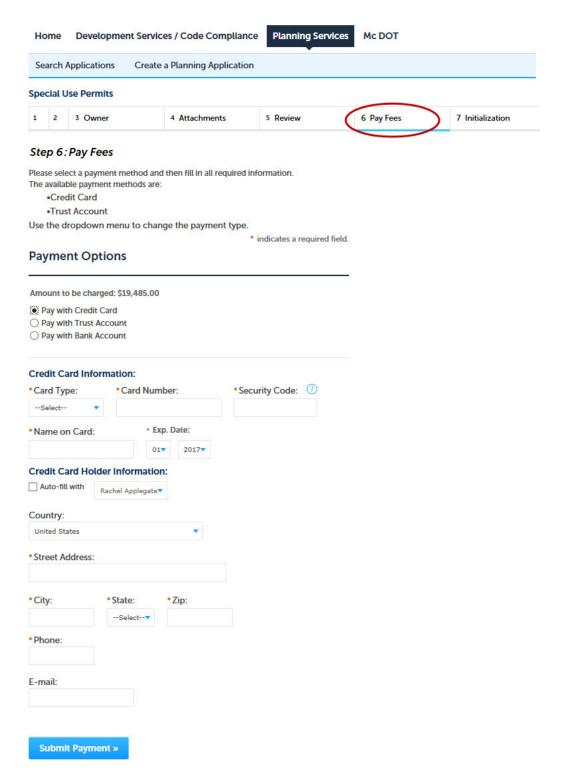
The Review screen is a summary screen of the data entered and uploaded attachments associated with the EDR application. Review each field and make any modifications by clicking on the **'Edit'** button. Review the certification statement and click the checkbox verifying application information. Click on **'Continue Application'**. See image of the Review screen on the next page.



EDR – Step 6 – Pay Fees

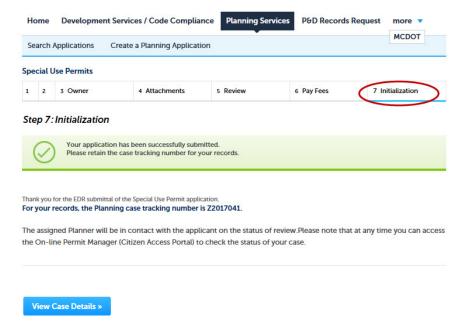
The Planning, Drainage Review, MCDOT, MCESD and Addressing fees are automated with the EDR application. The Pay Fee screen provides three options for payment, **Credit Card, Trust Account or Bank Account** Information. See screen image on next page:





Please note the application will not proceed past the Digital Counter Review (Front Counter Acceptance and Fees Payment EDR workflows) until the all fees are received.

EDR – Step 7 – Initialization



The final step in this process is the initialization screen which will provide a case tracking number.

The tracking number will also be displayed within the 'My Records' screen.

Validation of Submitted Attachments

Please validate that all submitted attachments are linked with the case tracking number. Click on the 'View Case Details' button on Step 7 – Initialization. Click on 'Record Info' and select 'Attachments'. Please ensure that all documents were uploaded with the EDR application and are shown within the table of the Attachments screen.

Digital Counter Review and Assessment

Once a tracking number is assigned to the project, the application materials will be submitted to the Digital Counter for review and assessment of fees. The Digital Counter includes the following database workflows (Front Counter Acceptance and Fees Payment).

The Digital Counter will assess fees and notify the applicant to process payment. Once payment has been made, the Digital Counter will push the Front Counter Acceptance and Fees Payment workflows. The applicant will receive an automated e-mail with completion of these workflows tasks.

A secondary auto-generated e-mail will be sent out once the special use permit application is routed to County agencies for review and comment.

<u>Project Manager – Assigned Planner</u>

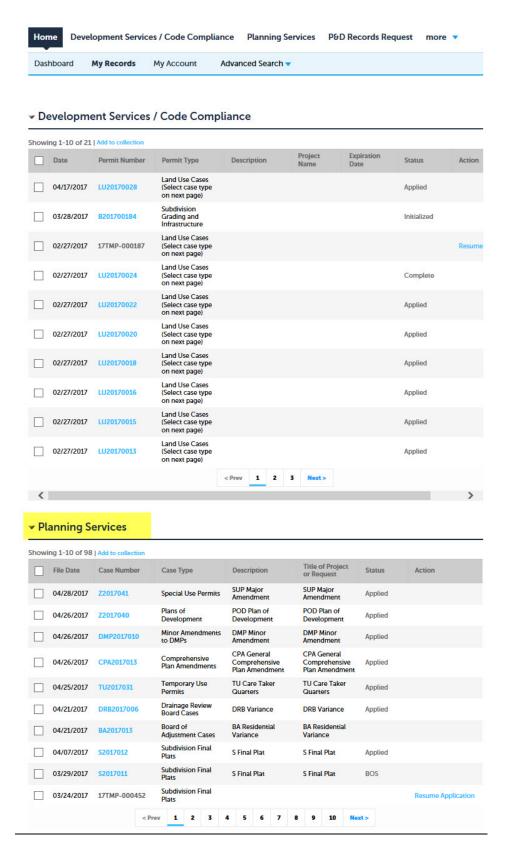
The remaining communication of the workflow processes and case status will be coordinated by the assigned staff planner responsible for the review of the case. Review comments and redlines will be provided back through the On-line Permit Manager for access and resubmittal of documents if required. Approval documents will also be provided via the On-line Permit Manager.

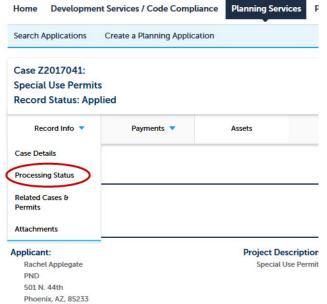
Tracking the Status of the EDR Application

Go to the On-line Permit Manager enter your login username and password.

Click on 'My Records' on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view applications.

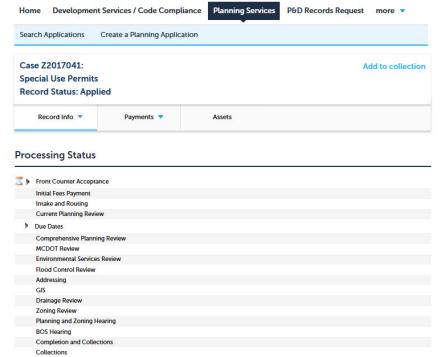
Click on the tracking number to display the application summary.





Click on the Record Info dropdown to select Processing Status.

Processing Status screen display the various workflow steps of the EDR application. You can click on the arrow next to the workflow step to display when a workflow step has been completed or is in progress.



Receiving Redlines and Review Comments

The assigned planner will notify the applicant via e-mail or by phone that review comments and redlines are available on the On-line Permit Manager for download. The comments will be a consolidated set of comments from all County reviewing agencies. Any comments received from areas of interest will be sent by staff via e-mail to the applicant.

Go to the On-line Permit Manager enter your login username and password.

Click on 'My Records' on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view submitted applications.

Click on the case tracking number to display the application summary. Click on the Record Info to display the drop down selection window and select 'Attachments'. The Attachments page will display the Corrections Report and Redline(s) available for download.

Click on the file name to open and download comments and redlines.

Submitting Revisions/Corrected/Updated Documents

- 1. Revised files are typically one of two types: (1) required resubmittals, or (2) revisions to previously approved documents. Each has different file naming recommendations, as noted below.
 - A. For required resubmittals: <u>Use the EXACT same filename as the original submittal.</u> Do not change the filename when submitting a new 'version' of your plans or supporting documents the system tracks versioning automatically. See the chart below.
 - B. For revisions to previously approved documents: Provide a revised file name instead of using the exact same filename as the originally submitted files. If resubmittals are required, continue to use this revised file name for subsequent resubmittals. See the chart below.
- 2. **Do not** *reorder, extract* or *insert* pages in the middle of your corrected plan sets. For example, if a 4-page set of structural plans was returned to you for corrections, resubmit a 4-page set of corrected structural plans in the same page order. *Rearranging, extracting or inserting pages out of order will result in delays for completing your plan review.*
 - A. If submitting new (additional) plans, plan sets or supplemental documents:
 - i. Revised/corrected plans **must** be submitted in the same page order as the previous submittal.

ii. Place <u>new pages at the end</u> of the corrected plan set document. **Do not** place new pages in the middle or beginning of the document. Do not reorder pages within the document.

The chart below shows the addition of two new pages to the *Sprinkler Diagrams.pdf*, with the added pages placed at the end of the set, as page 4-5.

1 st Submittal Filename (Original)	Pages	2 nd , 3 rd , etc. Required Resubmittal Filename	Pages
Floor Plans.pdf	10	Floor Plans.pdf	10
Sprinkler Diagrams.pdf	3	Sprinkler Diagrams.pdf	5
3 rd Submittal Filename (Approved)	Pages	Revision to Previously Approved File (New Review)	Pages
Floor Plans.pdf	10	Floor Plans REV .pdf	10

B. Removing Pages: If pages need to be removed from the plan set, instead of excluding/deleting them, place a 'slash' across those pages in CAD, mark them as 'Omit' and include the date they were omitted.

Why is page order important?

Resubmitting plans with the pages in the <u>original order</u> ensures that the Plan Checkers review comments and sketches are properly carried forward to the newer submittal/version by the electronic plan review software. This allows for more accurate, expedited document reviews.

How to Resubmit Revisions

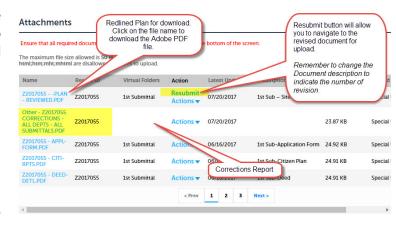
Go to the On-line Permit Manager enter your login username and password.

Click on 'My Records' on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view submitted applications.

Click on the case tracking number to display the application summary. Click on the Record Info to display the drop down selection window and select 'Attachments'.

Applicant Tip: – The resubmit button on the On-line Permit Manager only allows for a single document upload. Do not select multiple files for resubmittal as this will cause an error in processing.

Click on the 'Resubmit' icon next to the document that you will be resubmitting. A popup window will appear, navigate to the location

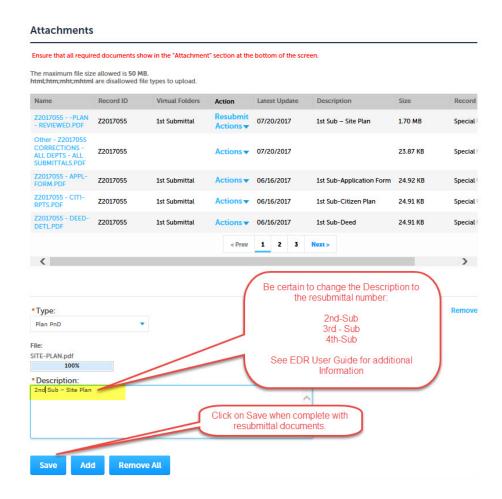


of the revised documents for upload. Click on 'Open', the ACA page will load up the revised document, update the

description to indicate resubmittal number. <u>Please note the name of the file should not be changed</u>, also please follow the format as listed in the *Required Attachments and Naming Structure* within this Guide. The only entry required is to update the Document Description to accurately display the resubmittal number.

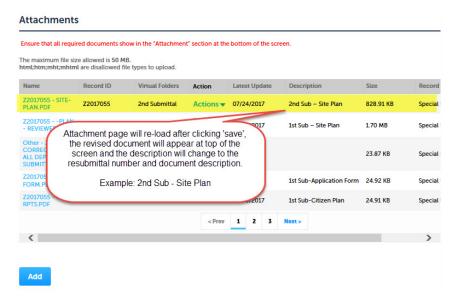
Example: for secondary submittal on a site plan, the document description would be changed to ' 2^{nd} Sub – Site Plan'.

Special Use Permit	Required Naming Convention	Document Description with Resubmittal (2 nd , 3 rd , 4 th , 5 th)
Site Plan 24" x 36"	SITE-PLAN	2 nd Sub-Site Plan
Narrative Report	NARR-RPTS	2 nd Sub-Narrative Report



Click on 'Save', scroll between the Attachment page to determine if submittal was successfully uploaded. The Virtual Folder will display the updated file with the submittal number. For example a second submittal will show in the Virtual Folder as '2nd Submittal' or show multiple iterations next to the record ID number.

The revised application will be routed to the assigned planner and Digital Counter for processing and routing. Staff will contact the applicant once the revisions are in process for review.



How to Receive Approval Documents

The assigned planner will notify the applicant via e-mail or by phone that the case has been approved and the stamped approved documents are available on the On-line Permit Manager for download.

Go to the On-line Permit Manager enter your login username and password.

Click on 'My Records' on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view submitted applications.

Click on the case tracking number to display the application summary. Click on the Record Info to display the drop down selection window and select 'Attachments'. The Attachments page will display the Approved documents within an 'Approved Virtual Folder' for download.

Click on the file name to open and download the narrative report and site plan. The approval letter will be sent via e-mail directly to the applicant by the assigned planner.

Troubleshooting & Contact Information for Assistance

The EDR application process is compatible with Internet Explorer v11, Silverlight v5, Firefox v51, Opera v42, and Chrome v56.

Please allow for pop-ups as part of the browser settings prior to application submittal.

AutoCAD 2016 Compatibility Note:

AutoCAD 2016 includes a feature that <u>automatically and by default converts</u> any existing SHX font text within a CAD file into 'editable content/comment objects' when saving to PDF format. This results in a 'comment' being created for each and every SHX text object found.

Solution:

To ensure that PDFs created with AutoCAD 2016 (or LT) do not contain these editable objects, please <u>install</u> <u>Service Pack 1</u> patches for AutoCAD 2016 (or LT) and then proceed to modify the AutoCAD's default settings per the instructions provided in the link below:

 $\frac{https://forums.autodesk.com/t5/autocad-2013-2014-2015-2016-2017/autocad-2016-shx-text-as-comment-in-exported-pdf/td-p/5555583$

Once these changes have been made, create the PDFs for submittal for plan review following remaining submittal recommendations above.

Optionally, <u>remove all SHX text</u> from the CAD document and replace it with a True Type Font (TTF) text. After generating the PDF from CAD, open each documents using Adobe and do a 'File/Save As'.

For assistance with the EDR application process or to address any questions, please contact the Planning and Development Customer Service team at 602-506-3301 or by e-mail at pdc.gov or contact Rachel Applegate at 602-372-0318 or via e-mail at rachelapplegate@mail.maricopa.gov